

Sales Coordinator/MQL to SQL Scorecard

Company: Petra Coach
Position: Sales Coordinator/Revenue (growth)
Location: Franklin, Tennessee (remote acceptable)
Compensation: (Base plus commission and benefits)
Online Listing: https://petracoach.com/new_career/sales-coordinator/

WHAT WE DO

Petra Coach leads organizations through implementation of the Rockefeller Habits during a 12-36 month engagement. We facilitate the development of the One Page Strategic Plan, identify annual and quarterly priorities, create a systematic process to execute the priorities, and develop a culture of purpose, alignment and accountability - and have fun doing it! The Coach leads members through this process side by side with an Accountability Coach using a process refined by The Petra Team. At our core, we are a MINDSHIFT business.

MISSION OF THE ROLE

The mission of this role is to increase sales qualified leads (candidates) through managing discovery calls with leads and converting them to candidates and/or closing these leads directly into membership level engagements. Most candidates/closes come from marketing generated contacts created in partnership with the marketing manager of Petra Coach. Additionally this role will report to the executive leadership team and must be effective in working with a team to create new member engagements .

Key Criteria/Requirements

- Has worked with at least two companies.
- 5+ years' experience in solution selling with a track record of increasing success.
- Has experience working with a marketing and operational team to deliver a seamless experience.
- Has experience selling to the C-Suite and/or high level decision makers.
- Demonstrated ability to effectively present to both individuals and teams.
- Has experience with closing mid-market business sales levels \$20,000 - \$50,000 commitments.
- Demonstrated ability to sell *change* to people who don't necessarily know they need it.
- *Digital marketing lead generation to conversion experience is highly valued (HubSpot)

| | | MAR | Rating | Comments |
|--|---|-----|--------|----------|
| CORE VALUES | | | | |
| There is no TRY – Only Do! | We don't make excuses – we make progress. We look at each challenge as a new level of growth that only makes each of us better. Nothing is left undone here, we finish what we start, and we do what we say – we don't try. We also believe that language is important, and you won't catch us using the word TRY in any context. | 5 | | |
| I've got your back – No matter what! | No one is in it for himself or herself. We sacrifice for one another to achieve more than we can alone and we never seek reward for any of it. All of us will at one time or another will find ourselves in a spot that we truly need another team member and by living this value we always 'know' that a team member will be there. | 4 | | |
| Please and Thank You – Say it and Mean it! | We recognize the power of appreciation and being nice. We say 'please' when asking and say 'Thank You' when it's deserved – which is often. We use handwritten notes and the spoken word to express these basic levels of respect. We 'seek out' moments that team members perform in a way that we can recognize them and we act on them. | 5 | | |
| Everything is an Experience – every time! | We make each interaction an experience. We ask ourselves – How can we add an extra 15% on top of what we have already done that would make someone say 'wow, that was an experience' – 'that was more than I expected' – 'I want to do this again' and then tell others about it. With one another, with our members, with our vendors and even with the mail carrier. Everything is an experience to be remembered and remarked about. | 4 | | |
| See around the Curves – anticipate needs and 'pre' fill them! | A big part of work involves us seeing what is coming before it arrives. In planning sessions with teams, in traveling via planes, trains and automobiles and as importantly with one another. Far before the moment arrives we think through what is coming and work to be prepared at a level most would consider overboard. By doing this we are uber prepared and gain the ability to respond with more agility than everyone else. We pay ultra-attention to what is being said and what is not being said in every interaction to 'see' what is coming next. | 4 | | |
| Be Curious – ask WHY and Improve! | We never feel like we know everything and have arrived. We never accept things as they are. We seek constant improvement in ourselves, in those around us, in our process, in everything. We ask 'Why does it need to be done this way' and seek ways to improve. We never stop as we know when we do – it's over. | 4 | | |

| KEY TECHNICAL COMPETENCIES | | | | |
|-----------------------------------|--|--|--|--|
| 1 | HubSpot CRM – Sales Hub – Pipeline and Funnel systems | | | |
| 2 | Outlook – General Communication Management | | | |
| 3 | Dropbox – Universal Storage and Selection of Materials | | | |
| 4 | Microsoft Office 365 – Word, Power Point, Excel, PDF (Adobe) | | | |
| 5 | Video Communication Competencies – Zoom as well as Recording | | | |

Measurable Accountabilities

| | Metric | Interviewer Rating (A, B, C) | Comments |
|---|---|------------------------------|----------|
| Quick impact on revenue <u>*15 new members (closes) is a minimum requirement) – goal is 25+ per quarter</u> | Qtr. 1: 10 Closes / MRR \$40,000 Qtr. 2: 15 Closes / MRR \$60,000 Qtr. 3: 20 Closes / MRR \$80,000 Qtr. 4: 25 Closes / MRR \$100,000 | | |
| Gross Margin Generation | 55% as an average | | |
| Retention Focus | Year 1: > 18 months Year 2: > 24 months Year 3: > 30 months | | |
| Candidate Prospecting (basis) <u>*100 Leads/Candidates direct contact with connect rate measurements</u> | Spends at least 80% of time prospecting (based on process) to do discovery and create meetings | | |
| Candidate Interaction (basis) <u>*30 Candidates to Membership meetings</u> | 30 meetings with candidates per week via phone, video conference, or face-to-face | | |
| Reporting/CRM Data | Real time CRM data updates with weekly team reporting and planning | | |
| Key Competencies | Minimum of rating of 8.5 on resourcefulness, excellence, likeability, listening, communications, and resiliency. | | |

Rating Scale: **A – Can predictably meet or exceed expectations** **B – Will predictably fall somewhat short of expectations**
C – Will predictably fall far short of expectations

Key Competencies

- Resourcefulness
- Results-Oriented
- Excellence
- Independence/ Entrepreneurial
- First Impression
- Likeability
- Listening
- Relationship Building
- Communications
- Negotiation
- Persuasion
- Ambition
- Tenacity

Full List of Competencies

| Rating Scale: 5 = Excellent 4 = Very Good 3 = Good 2 = Only Fair 1 = Poor | | MAR – Minimum Acceptable Rating | | |
|---|---|---------------------------------|------------------|----------|
| Ease of Changing Competency: | | Difficult | Hard, But Doable | Easy |
| Competency | Definition | MAR | Your Rating | Comments |
| INTELLECTUAL | | | | |
| Intelligence | Ability to acquire understanding & absorb information rapidly. A quick study. A clear and agile thinker; quick on their feet. Handles objections quickly and effectively. | 4 | | |
| Analysis Skills | Identifies significant problems & opportunities. Analyzes problems and people in depth. Sorts the wheat from the chaff, determining root cause. | 4 | | |
| Judgment/Decision Making | Consistent logic, rationality & objectivity in decision making. Neither indecisive nor hip-shooter. | 4 | | |
| Conceptual Ability | Deals effectively with not just concrete, tangible issues but with abstract, conceptual matters | 5 | | |
| Creativity | Generates new approaches to problems or innovations to established best practices. Shows imagination | 4 | | |
| Strategic Skills | Determines opportunities & threats through comprehensive analysis of current & future trends. Comprehends the big picture. | 3 | | |
| Forward-thinking | Preempts problems. Anticipates future issues and works to contain them before they become problems. | 4 | | |
| Risk Taking | Takes calculated risks, with generally favorable outcomes. Does not “bet the farm.” | 3 | | |
| Education | Has had formal sales and sales management training and holds an undergraduate degree from a reputable university. | 3 | | |
| Experience | See key criteria and requirements. | 3 | | |
| Track Record | Successful career history of meeting or exceeding performance expectations. Generally earns performance ratings of “excellent.” | 5 | | |
| PERSONAL | | | | |
| Integrity | Iron clad. Does not ethically cut corners. Earns trust of co-workers. Puts organization above self-interests. | 4 | | |
| Resourcefulness/ Initiative | Passionately finds ways over, around, or through barriers to success. Achieves results despite lack of resources. Goes beyond the call of duty. | 5 | | |
| Results-oriented | Bias toward action; a “doer.” Continually takes action that is revenue generating. | 5 | | |
| Organization/Planning | Plans, organizes, & schedules in efficient, organized manner. Focuses on key priorities | 4 | | |
| Excellence | Sets high stretch standards of performance for self and others. Low tolerance for mediocrity. High sense of responsibility. | 5 | | |
| Independence/ Entrepreneurial | Able to deliver results without a lot of direction. Versatile | 5 | | |
| Stress Management | Stable & poised under pressure. | 4 | | |

| Competency | Definition | MAR | Your Rating | Comments |
|-------------------------------------|---|----------|-------------|----------|
| Self-Awareness/ Feedback | Recognizes own strengths & weaknesses. Not defensive. Does not rationalize mistakes or blame others. Uses feedback mechanisms. | 4 | | |
| Adaptability | Not rigid. Copes effectively with complexity and change. Resilient. Does not take “no” personally. | 4 | | |
| INTERPERSONAL | | | | |
| First Impression | Professional in demeanor. Creates favorable first impression – body, language, eye contact, posture, etc. | 4 | | |
| Likability | Puts people at ease. Shows Emotional Intelligence. Warm, sensitive, compassionate. Not arrogant. Friendly, sense of humor, genuine. | 4 | | |
| Listening | Tunes in accurately to opinions, feelings, and needs of people. Empathetic. Patient. Let’s others speak. Listens actively. | 5 | | |
| Relationship Builder | Establishes partner relationship with clients. Visible & accessible to clients. Interacts effectively with executives, human resources, and brokers. | 5 | | |
| Team Player | Reaches out to peers. Overcomes we-they. Approachable. Does what is best for company. | 5 | | |
| Assertiveness | Takes forceful stand on issues without being excessively abrasive. Tactfully keeps prospects focused on key points and priorities. | 4 | | |
| Communications – Oral | Communicates well one on one, in small groups and public speaking. Fluent, quick on feet, command of language. Keeps people informed. | 5 | | |
| Communications – Written | Writes clear, precise, well-organized documents using appropriate vocabulary, grammar & word usage. | 5 | | |
| Political Savvy | Aware of political factors and hidden agendas, and acts effectively with that awareness. Can effectively influence all parties in a complex selling situation. | 5 | | |
| Negotiation | Achieves favorable outcomes in win/win negotiations. | 5 | | |
| Persuasion | Persuasive in selling a vision. Convincing. | 5 | | |
| MOTIVATIONAL | | | | |
| Energy/Drive | Exhibits energy, strong desire to achieve, high dedication level. | 5 | | |
| Enthusiasm/Passion | Exhibits dynamism, excitement, and a positive can do attitude. Passionate about making clients’ lives easier, saving them money, and helping Petra Coach reach its goals. | 5 | | |
| Ambition | Strong desire to earn \$250K+ annually. | 5 | | |
| Compatibility of Needs | Willing and able to do relationship building activities with prospects and sales people outside of normal business hours (breakfasts, dinners, weekends). | 4 | | |
| Tenacity | Consistent reward of passionately striving to achieve results. Conveys strong need to win. Reputation for not giving up. | 5 | | |